

## Job Aid: MARCH SALE

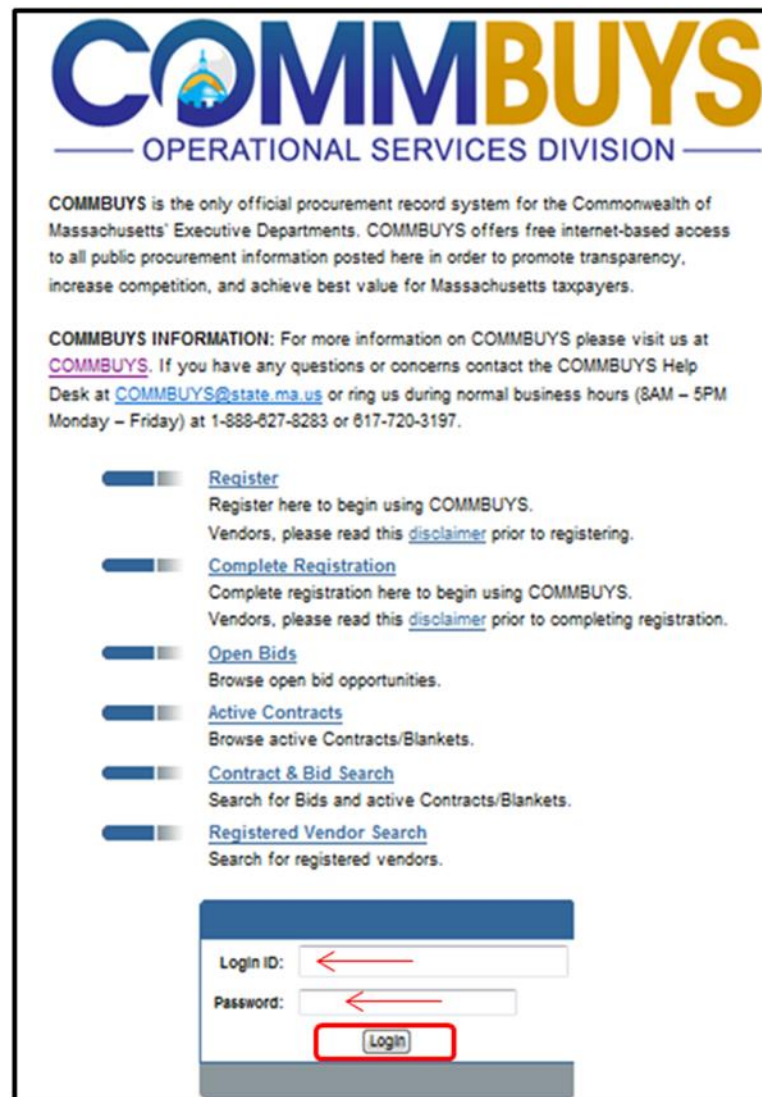
### How to Create a Release Requisition and Purchase Order (Contract Purchase)

**This Job Aid shows how to:** Take advantage of these special **March to \$avings** offers, by entering Promo Code “**Sale2016**” in **Step 4** of this Job Aid.

#### Of Special Note:

The Operational Services Division is launching a month-long sale on a wide array of Statewide Contract (SWC) Products and Services! All buyers eligible to purchase from SWCs may take advantage of these special **March to \$avings** offers. More than **130** SWC Vendors have signed on to offer product and service discounts on top of their negotiated contract agreements for eligible purchases issued **March 1 - 31, 2016**. This is an opportune time to match your organization's 2016 purchasing needs with our **March to \$avings** offers.

#### Screenshot



#### Directions

**Step 1:** Launch the COMMBUYS Web site by entering the URL <https://www.commbuys.com/bso/> in the Browser.

Enter your login credentials and click the **Login** button on the COMMBUYS home page.



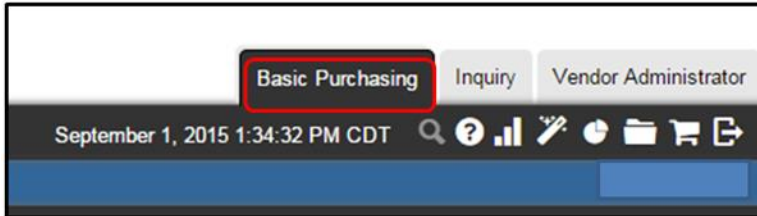
OPERATIONAL SERVICES DIVISION

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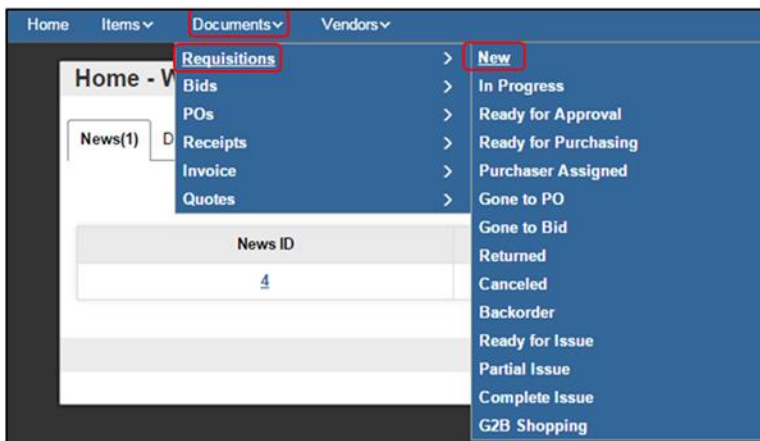
### How to Create a Release Requisition and Purchase Order (Contract Purchase)

#### Screenshot

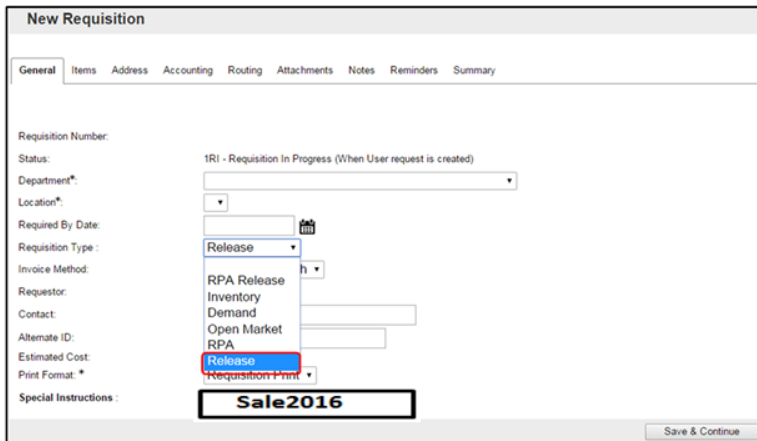
#### Directions



**Step 2:** Upon successful Login, if you have multiple roles in COMMBUYS, select the **Basic Purchasing** or **Department Access** role on the upper right side of the page, if not already selected.



**Step 3:** From the Navigation Bar, select **Documents > Requisitions > New**



**Step 4:** The General tab for the requisition opens. On the left side of the screen, complete the following fields:

- **Department:** defaults from user profile. May be changed, using the dropdown if other departments are available to user.
- **Location:** defaults from user profile. May be changed, using the dropdown if other locations are available to user.
- **Required by Date:** optional
- **Requisition Type:** Open Market
- **Requester:** user that created the requisition; this field cannot be edited
- **Contact:** contact for this requisition; can be changed
- **Estimated Cost:** calculated by COMMBUYS; not editable by user
- **Special Instructions:** COMMBUYS buyers must enter the **Sale2016** Promo Code in the **Special Instructions** field on the Requisition.



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### How to Create a Release Requisition and Purchase Order (Contract Purchase)

#### Screenshot

#### Directions

Short Description\*

Fiscal Year: 2016

Organization: Operational Services Division

Solicitation Enabled

Entered Date: 09/01/2015

Type Code:

Purchaser:

Contact Phone: 617 979 1524

Tax Rate:

Save & Continue

**Step 5:** The right half of the **General** tab, complete the following fields: (\*) are required fields.

- **Short Description\*:** be specific as this field can also be used as search criteria to locate a requisition – can be used as a place for your Department doc number
- **Fiscal Year:** defaults to the current Fiscal Year
- **Organization:** default value based on your user profile
- **Solicitation Enabled:** select if this requisition will convert to a bid (request quotes from Contract vendors)
- **Entered Date:** defaults to the current date
- **Type Code:** select the most appropriate option from the drop down list
- **Purchaser:** defaults to users' name; use the dropdown to select a different purchaser
- **Contact Phone:** defaults to user's profile value; can be updated as needed
- **Tax Rate:** N/A for Commonwealth, leave blank.

Click the **Save & Continue** button to save the information entered on the General tab.

Release Requisition RQ-16-1080-OSD01-OSDEP-00000025752

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

There are no items. Please click 'Search Items' below to add an item.

Search Items

**Step 6:** To add items to the requisition, click on the **Items** tab.

Click the **Search Items** button to begin the process of adding contract goods or services to the requisition.



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### How to Create a Release Requisition and Purchase Order (Contract Purchase)

#### Screenshot

#### Directions

Release Requisition RQ-16-1080-OSD01-OSDEP-00000025752 - Search Items

Search Using:  Find It

Advanced Search

Search Using: ALL of the criteria

Search Fields:

Contract/PO #	<input type="text"/>	Description	<input type="text" value="per"/>
Item Description	<input type="text"/>	Vendor Name	<input type="text"/>
Catalog	<input type="text"/>		
Item Type	<input type="text"/>		
U N S P S C Segment-Family	<input type="text"/>		
U N S P S C Class	<input type="text"/>		
Commodity EPP	<input type="text"/>		

Cooperative Purchasing ☐

Result Type: Item ☐ Show Orderable Only

Find It Clear

Add to Req & Exit Cancel & Exit

**Step 7:** The item lookup or Search Items page opens. Input the search criteria and click **Find It**.

Or click **plus (+)** sign next to Advanced Search to open more search fields.

Enter search criteria and click **Find It** to reveal search results.

Release Results

Search By:

Any Price

- Up to \$2.00
- \$2.00 - \$5.00

Any Vendor

- Bob Barker Co., Inc. (1)
- Charm, Tex. (1)
- Garelick Farms (1)
- Mathematica Policy Research, Inc. (1)
- Office Essentials (4)

Show more

Select	Quantity	Minimum Order Quantity	Item Description	Unit Cost	UOM	Vendor Name
<input type="checkbox"/>	0	0	Ballpoint pens, medium, blue ink	\$1.00	EA - Each	Office Essentials
<input type="checkbox"/>	0	0	Ballpoint pens, medium, black ink	\$1.00	EA - Each	Office Essentials
<input type="checkbox"/>	0	0	Ballpoint pens, fine, blue ink	\$1.25	EA - Each	Office Essentials
<input type="checkbox"/>	0	0	Ballpoint pens, fine, black ink	\$1.25	EA - Each	Office Essentials
<input type="checkbox"/>	0	0	Rollerball pens	\$3.12		Pets R Us
<input type="checkbox"/>	0	0	Instructions for bidders - Rules 1) Calendar Rule Type: An additional opportunity to respond may be offered during ...	\$0.00		Garelick Farms

Add to Req & Exit Cancel & Exit

**Step 8:** The search results display showing unit cost, UOM, vendor, etc. for each item.

Check the **Select box** of the desired item. Enter a number in the quantity field and click the **Add to Req & Exit** button located at the bottom of the page.

The search process is the same for a service, although some SWC & Departmental Contracts will have **conversion vendor** under vendor name.



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### How to Create a Release Requisition and Purchase Order (Contract Purchase)

#### Screenshot

#### Directions

Release Requisition 1400176

General | **Items** | Vendors | Address | Accounting | Routing | Attachments(2) | Notes | Reminders(1) | Summary

Sort by Column: Print Sequence | Sort Descending | Go

Item #	Links	Print Sequence	Quantity	Minimum Order Quantity	Catalog Price/ Unit Cost
1.	Master Blanket # / Line #: 000009Z / 1	1.0	24.0	0.0	\$1.00
2.	Master Blanket # / Line #: 000009Z / 2	2.0	24.0	0.0	\$1.00
3.	Master Blanket # / Line #: 000009Z / 3	3.0	24.0	0.0	\$1.25
4.	Master Blanket # / Line #: 000009Z / 4	4.0	24.0	0.0	\$1.25

**Step 9:** The **Items** tab refreshes with the selected items added to the requisition.

You can click on the **item # (number)** (left side of page) to view additional details

**NOTE:** The master blanket number of the selected item(s) is located also included. (this is the COMMBUYS Contract number)

Release Requisition 1400176

General | **Items** | Vendors | Address | Accounting | Routing | Attachments(2) | Notes | Reminders(1) | Summary

Item # 1 | Print Sequence 1.0 | Item Type Normal | Item Status In Progress

Master Blanket # / Line # 000009Z / 1 | Minimum Order Quantity 0.0

Master Blanket Line Description: Ballpoint pens, medium, blue ink

Description: Ballpoint pens, medium, blue ink

Quantity	Catalog Price/ Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
24.0	\$1.00	\$1.00	EA- Each	0.0%	\$0.00	\$24.00

U/S P S C Segment Family: 10-10- Live animals | Tax Rate: | Tax Amount: \$0.00 | Extended Amount: \$24.00

U/S P S C Class: 10- Livestock

Commodity-ERP: 10-10-10-04-0000- Milk

Manufacturer: | Brand: | Model: | Packaging: |

Save & Exit | Save & Continue | Save & Copy | Reset | Cancel & Exit

**Step 10:** Item detail opens. This is where you have the option to edit the **Description** Field.

**Note:** Important for some contracts where you need to explain item/service detail

**Note:** Items/services with a \$0 unit cost can be edited to enter a correct cost and item description. Follow instructions on the Master Blanket in COMMBUYS to obtain item and pricing data.



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Release Requisition 1400176

General Items **Vendors** Address Accounting Routing Attachments(2) Notes Reminders(1) Summary

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method
00000028		Office Essentials	Email

Save & Continue Print

**Step 11:** Click the Vendor tab.

The **Vendor** tab contains information about the vendor that will receive the purchase order and deliver the items. This information is auto populated based on the items/services selected.

Release Requisition 1400176

General Items Vendors **Address** Accounting Routing Attachments(2) Notes Reminders(1) Summary

Address Validation Warnings

- Item # 1, 2, 3 and 4: No ship-to address. Ship-to address "100 - 10055" at header level will be used instead.

**Ship-to Address**

100 - 10055

Anne Bell  
One Congress Street  
11th floor  
Boston, MA 02114  
US  
Email: linda.banks-grant@accenture.com  
Phone: (617)999-9999

Save & Continue Apply Ship-to to All

**Step 12:** Click the **Address** tab.

The **Address** tab opens. Displayed here is the left side of the page where the Ship-to Address is located.

As long as the ship to address is present at the header level and all items are going to the same ship-to address, the ship-to address does not need to be on each individual requisition line item.

Release Requisition 1400176

General Items Vendors Address Accounting Routing **Attachments(2)** Notes Reminders(1) Summary

Agency(0) Vendor(0)

**Files**

Click Add File to add file attachments.

No File Attachments

**Forms**

Click Add Form to add form attachments.

No Form Attachments

Add File Add Form

**Step 13:** Click the **Attachments** tab. The **Attachments** tab displays.

If any files auto-attach: review, keep or delete as necessary.

Attachments include bid attachments and required forms/contract documents

Click the **Add File** button to add a new file.

**Note:** Add Form is not currently a working function in COMMBUYS





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#### Directions

**Add File**

**Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters.

Name\*:

Description:

File\*:

Location: 2500

**Step 14:** The **Add File** window opens. To select a file from your desktop, click the **Browse** button. This will search for documents from your computer. Select the desired file.

Complete the following fields

- **Name** – required; but will be populated with the selected file name if left blank
- **Description** – optional

Click **Save & Continue** to add another file or click **Save & Exit** when all files have been added.

**Note:** Files previously uploaded or added to the Document Library in COMMBUYS are available in the Attachment Repository. To locate and attach from the Repository, click the **Search File** button and complete the advanced search criteria.

For additional information on adding attachments refer to the job aid **How to Search for and Use Attachments in COMMBUYS**.

**Open Market Requisition 1400176**

General | Items | Vendors | Address | Accounting | Routing | **Attachments(2)** | Notes | Reminders(1) | Summary

Agency(2) | Vendor(0)

**Files**

Name	Description	Show Vendor
<a href="#">Meeting format.docx</a>		<input checked="" type="checkbox"/>
<a href="#">attachment two</a>	attachment two of two	<input checked="" type="checkbox"/>

**Forms**

**Click Add Form to add form attachments.**

No Form Attachments

**Step 15:** The **Attachment** tab redisplay with a list of attached files.

\*You can opt to disallow the vendor to view the attachments by unchecking the **Show Vendor** box.



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#### Screenshot

**Release Requisition 1400176**

General Items Vendors Address Accounting Routing Attachments(1) Notes Reminders(1) **Summary**

**Overall Validation Warnings**

- Item # 1, 2, 3 and 4: No ship-to address. Ship-to address "100 - 10055" at header level will be used instead.

**Header Information**

<b>Requisition Number:</b>	1400176	<b>Short Description:</b>
<b>Organization:</b>	Operational Services Division	
<b>Department:</b>	00100 - PETS PLUS	<b>Location:</b>
<b>Entered Date:</b>	12/17/2013	<b>Requisition Type:</b>
<b>Requestor:</b>	Buyer Buyer	<b>Purchaser:</b>
<b>Contact:</b>	Buyer Buyer	<b>Contact Phone:</b>
<b>PCard Enabled:</b>	No	<b>Estimated Cost:</b>
<b>Solicitation Enabled:</b>	No	
<b>Invoice Method:</b>	Three Way Match	
<b>Ship-to Address:</b>	Anne Ball One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)999-9999	<b>Bill-to Address:</b>

Status: 1RI - In Progress

**Test Requisition**

<b>Status:</b>	1RI - In Progress
<b>Required By Date:</b>	01/16/2014
<b>Type Code:</b>	
<b>Fiscal Year:</b>	2014
<b>Alternate ID:</b>	
<b>Print Format:</b>	

100 - BOS-PP  
Release  
Buyer Buyer  
(555)555-1000  
\$108.00

Inventory User  
211 E. 7th Street  
Suite 1100  
211 E. 7th Street  
Austin, TX 78701  
US  
Email: gflores@periscopeholdings.com  
Phone: (512)666-9400

#### Directions

**Step 16:** Click the **Summary Tab** to view a summary of the nearly completed requisition.

**NOTE:** Picture is split for ease of viewing

Other/optional tabs:

- **Accounting Tab:** Phase II
- **Routing Tab:** auto-populated, after approval, based on approval workflow
- **Notes Tab:** optional
- **Reminders Tab:** optional

**Item # 4: Ballpoint pens, fine, black ink** 1RI - In Progress

UNSPSC Segment-Family: 10-10-15-04-0000

Blanket/Contract #/Line #	Qty	Minimum Order Quantity	Unit Cost	Net Unit Cost
0000097 / 4	24.0	0.0	\$1.25	\$1.25

**Manufacturer:** **Brand:**

**Make:** **Packaging:**

**Account Code**

There is no item account

Submit for Approval Cancel Requisition

**Step 17:** Shown here is the lower part of the **Summary** tab that provides a summary of each item on the requisition as well as the action buttons currently available for the requisition.

Submit for Approval

- Cancel Requisition
- Clone Requisition
- Print

Review the Summary page information.

Click the **Submit for Approval** button to submit the requisition into workflow for approval.

**NOTE:** Picture is split for ease of viewing





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#### Directions

Progress

UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
EA - Each	0.00%	\$0.00		\$0.00	\$30.00

Model:

Amount

g available for this item.

Recommended Vendor:

00000020 - Office Essentials:  
Linda Banks-Grant  
1500 Outstanding Way  
Suite 5670  
Boston, MA 02114  
US  
Email: linda.banks-grant@accenture.com  
Phone: (617)800-8000

Clone Requisition Print

Message from webpage

Are you sure you want to submit this requisition?

OK Cancel

**Step 18:** A popup message displays asking 'Are you sure you want to submit this requisition?'

Click **OK** to continue with the submission.

To cancel the submission, click **Cancel**.

Only one approval path "022" matches the document's criteria.

Approval Path	Description	Dollar Range
022	just to make sure	\$0.00-\$100.00

Please click Continue to continue submitting the document, or click Cancel & Exit to cancel the document submission and go back to the document.

Continue Cancel & Exit

**Step 19:** The approval path for the requisition displays. It provides information about the approval path such as description, dollar range, user, the approval level and the approval type.

Click **Continue** to complete submission.

Status: 1RRA - Ready for Approval

**Step 20:** The requisition Summary tab redisplay. The status has been updated to:

- Status 1RRA – Ready for Approval

**Note:** For Department Access and some Basic Purchasing users the process ends at this step, the submission of the release requisition into workflow for approval. This will depend upon your agency / department purchasing workflow approval process.



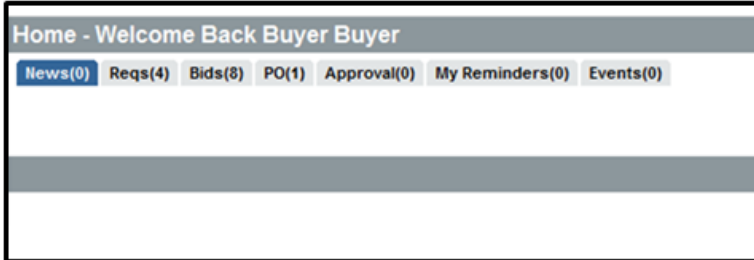
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### How to Create a Release Requisition and Purchase Order (Contract Purchase)

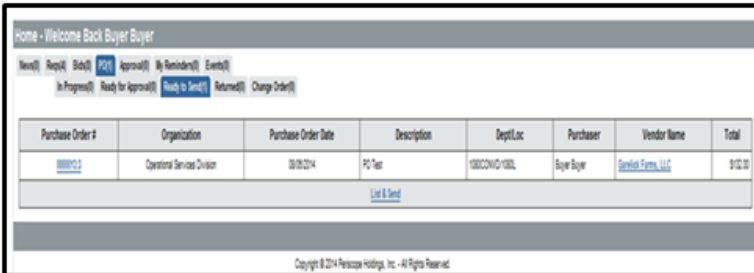
#### Screenshot

#### Directions



**Step 21:** Depending on your agency's COMMBUYS workflow and your COMMBUYS user role, once the requisition has been approved you are able to find the generated Purchase Order (PO) and send the PO to the Vendor.

From your **Control Center** click on the **PO** tab.



**Step 22:** Click on **Ready to Send**, which is a sub tab of PO.

You will see all the purchase orders you as a user have in Ready to Send status.

A new COMMBUYS number was created for the Purchase Order so review the Description and Vendor name then click on the correct **Purchase Order #**.



**Step 23:** The PO opens to the **Summary tab**; review all information for accuracy.

Scroll down to the bottom of the page and select one of the options:

- Send Email and Notify Vendor
- Set to Printed Status (still posts purchase order on COMMBUYS but does not send any vendor emails)

Click **Save and Continue** to finalize the PO and place the order.